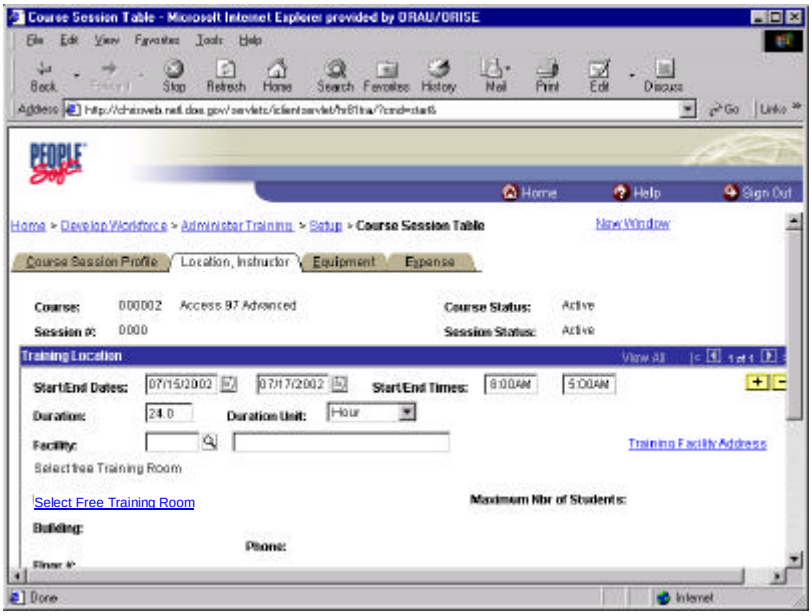
Entering Data into Course Session Location, Vendor Screen

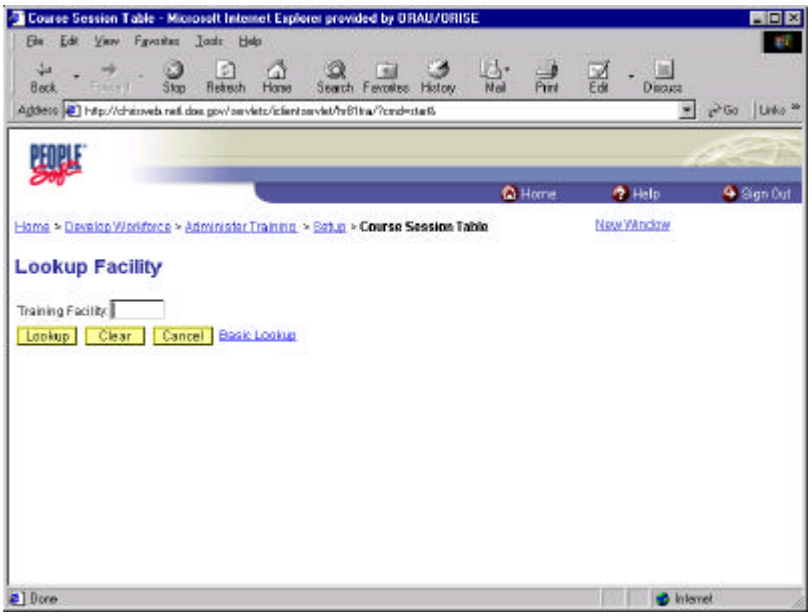
The "Course Session Tables Location, Vendor" tab identifies the vendor and the location for the course session. It is important to complete this tab so that the information will be picked up automatically on the "Student Training" screen when an employee is registered for the session. Additionally this information will be picked up by the web-based DOE Course Catalog and Training Schedule.

Note: "Location" is used to identify the classroom and the facility address. The "Vendor" portion of this screen associates the vendor and/or instructor with the course session. (Reminder: Only DOE employees should be entered into CHRIS as instructors.)



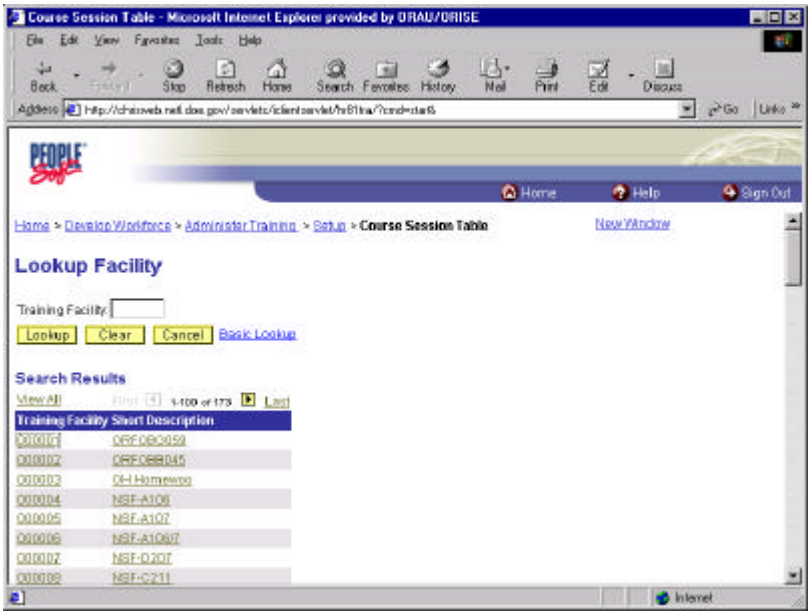
Note: Entering data into the "Vendor, Instructor" tab will NOT reserve the facility! Reserving the room is a LOCAL function. The "Vendor, Instructor" tab simply identifies the facility. You should continue following your established practice for room reservations.

24. Click on the magnifying glass to the right of the "Facility" field if you do not know the facility code.



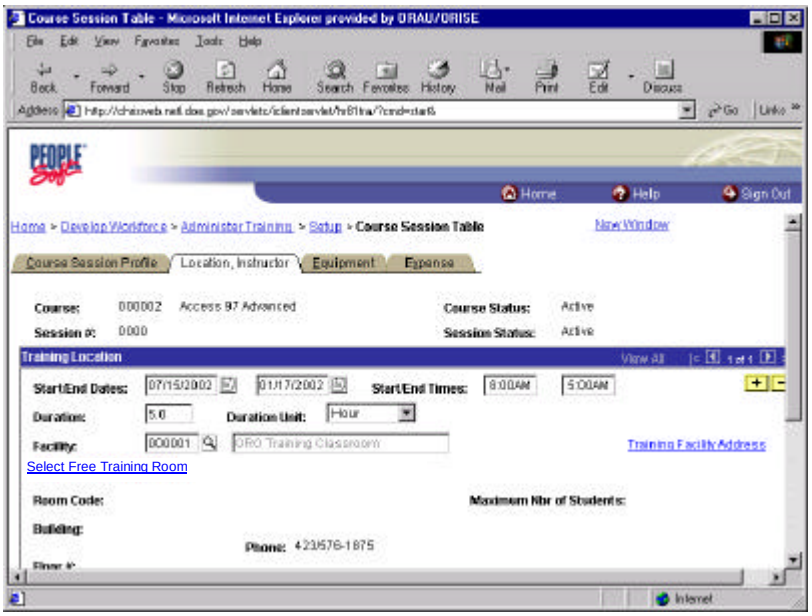
The "Course Session Table" "Lookup Facility" screen is displayed.

25. Click on the "Lookup" button.



A list of all DOE facilities is displayed.

26. Locate the required facility and click on it. This enters the facility code into the correct field.



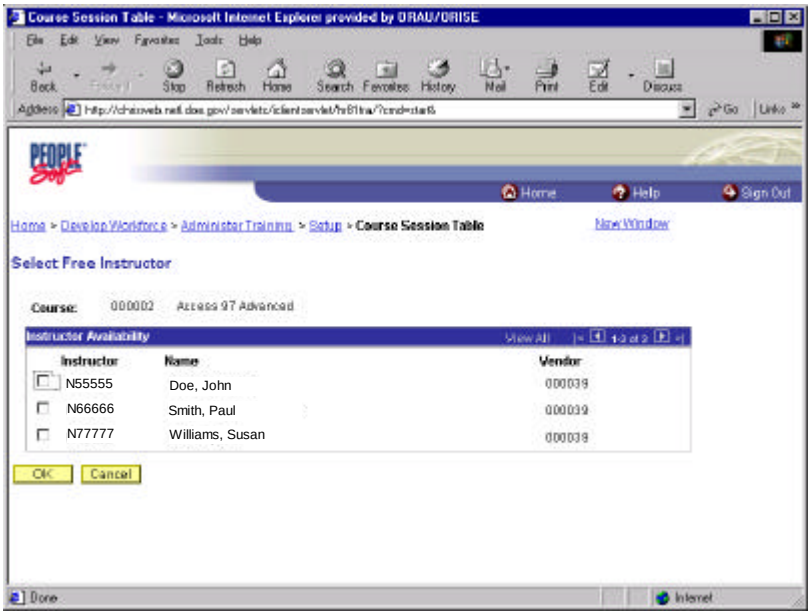
Two links are also displayed. The "Select Available Training Room" link and the "Training Facility Address" link. The "Select Available Training Room" displays a list of available classrooms for the code entered. The Training Facility Address link displays the complete address of the facility.

27. Click on the magnifying glass next to the "Vendor" field. The "Course Session Table" "Lookup Vendor" screen is displayed. Search by "Vendor Type," "Description," or just click the "Lookup" button. Select vendor from the Search Results.

    Note: You may select more than one vendor and expense for any session. For example, Facility Vendor (hotel) and a training vendor.

28. Click on "Select Available Instructor," to select a DOE employee as an instructor.

The "Course Session Table" "Select Available Instructor" is displayed with a list of available instructors.



29. Select an instructor for the session and click on the "OK" button.

Note: If no instructors are displayed, no instructors are available.

Instructor ID

BUSINESS RULE

The "Instructor ID" field is used only if the instructor is a DOE employee and created by the system when an instructor is entered via the "Instructor Table." If the instructor is a non-DOE employee, simply enter the instructors name in the proper CHRIS format (Lname,Fname).

Note: If there is more than one vendor or instructor to add, click on the + . A row will be added.

30. Click on the "Equipment" tab.

Best Practice: Facility Reservation

Reserve the facility BEFORE entering facility information into CHRIS. Otherwise, you may have to revise your facility information in case the facility is unavailable.

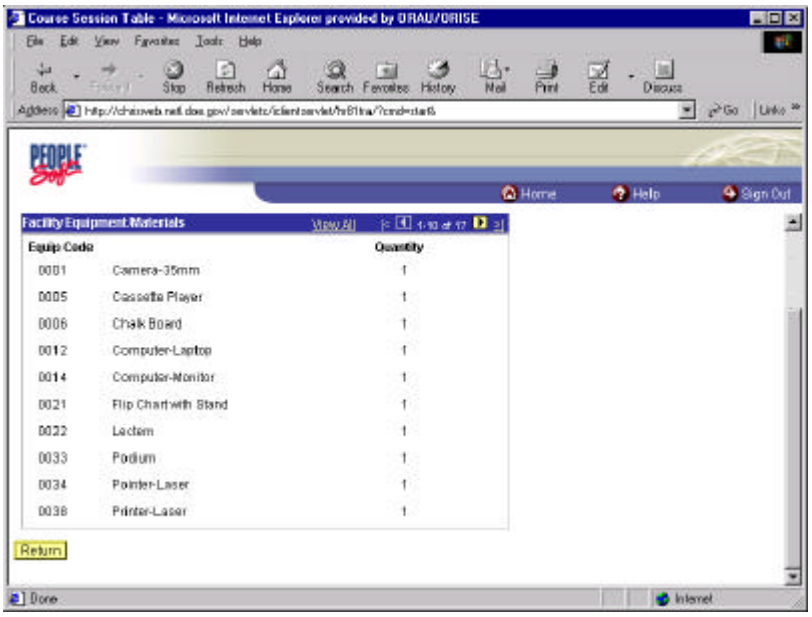
Best Practice: Facility Codes

Keep a list of frequently used facility codes near your desktop. This will keep you from hunting through the CHRIS list. Remember that these tables are not alphabetical or chronological.

Entering Data into Course Session Equipment Tab

The "Equipment" screen identifies the equipment needed for the course session.

31. Click on the "Training Facility Equipment" link.



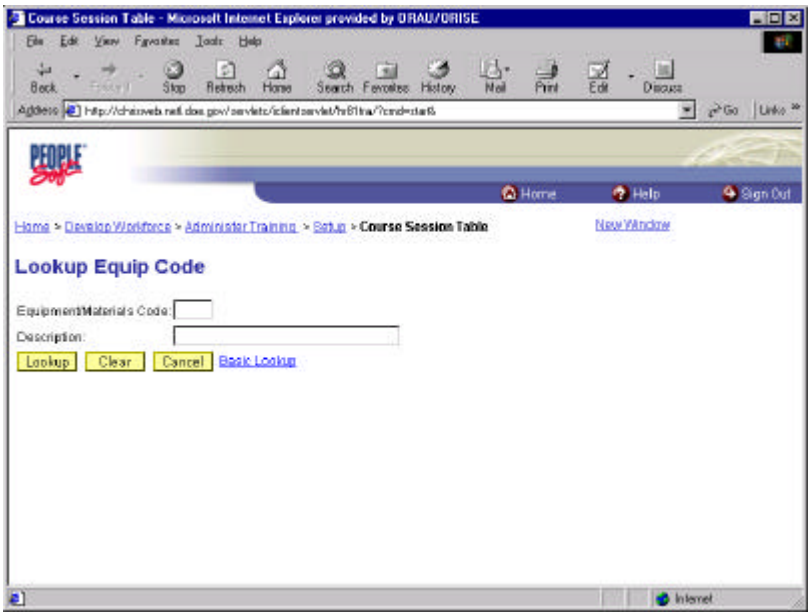
A list of the equipment that the selected facility has available is displayed.

32. Record the "Equip Code" of the equipment required.

33. Scroll down and click the "Return" button to return to the "Equipment" screen.

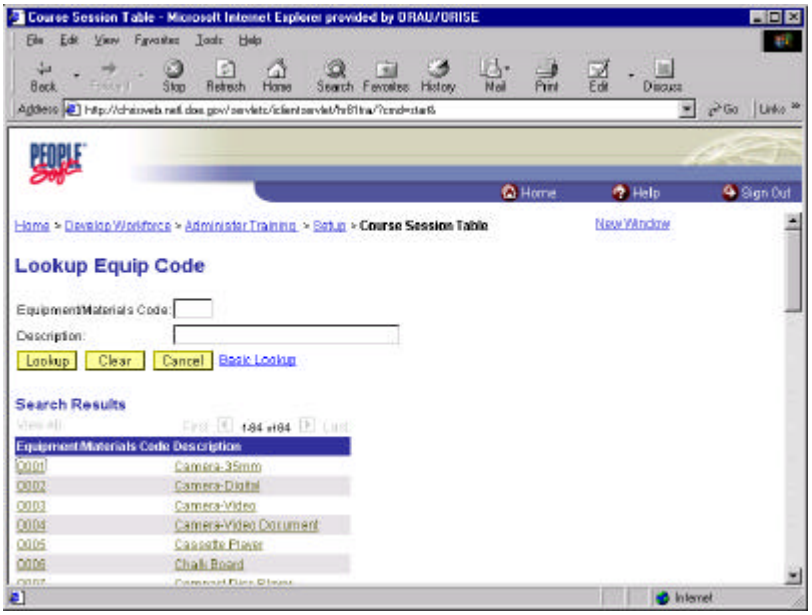
34. Enter the first "Equip Code" recorded in step 32 above. Click the + to add each piece of equipment desired.

35. Click on the magnifying glass to the right of the "Equip Code" field, if the session requires equipment that the classroom does not currently have.



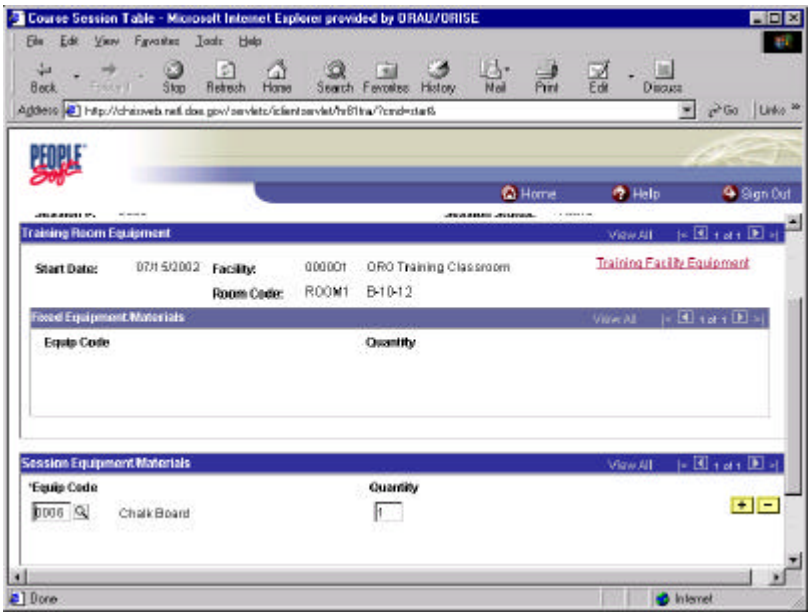
The "Course Session Table" "Lookup Equip Code" screen is displayed.

36. Click on the "Lookup" button.



A list of equipment is displayed.

37. Click on the required equipment.



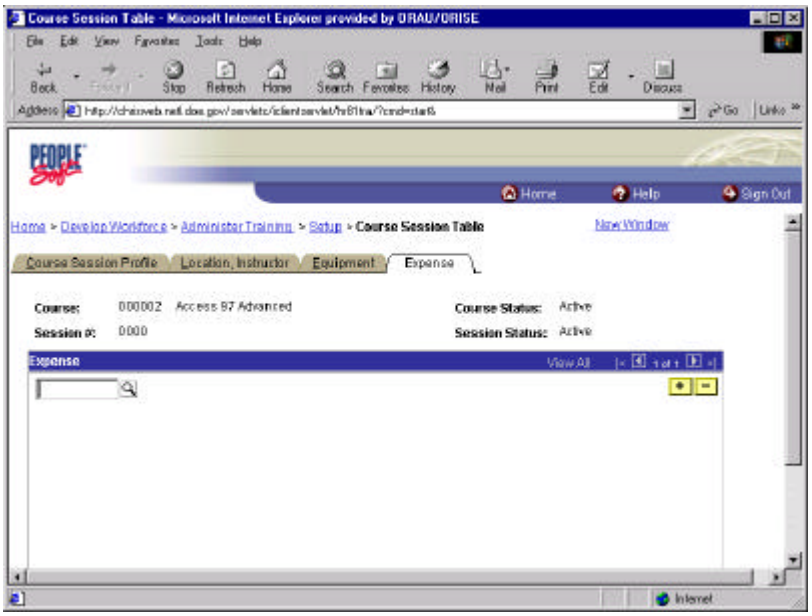
The equipment code and description are displayed.

Note: To add additional equipment or material, click on the + located on the right of the screen. A new data field appears below the first entry. Users can add as many entries to the "Equipment" tab as needed.

Entering Data into Course Session, "Expense" Tab

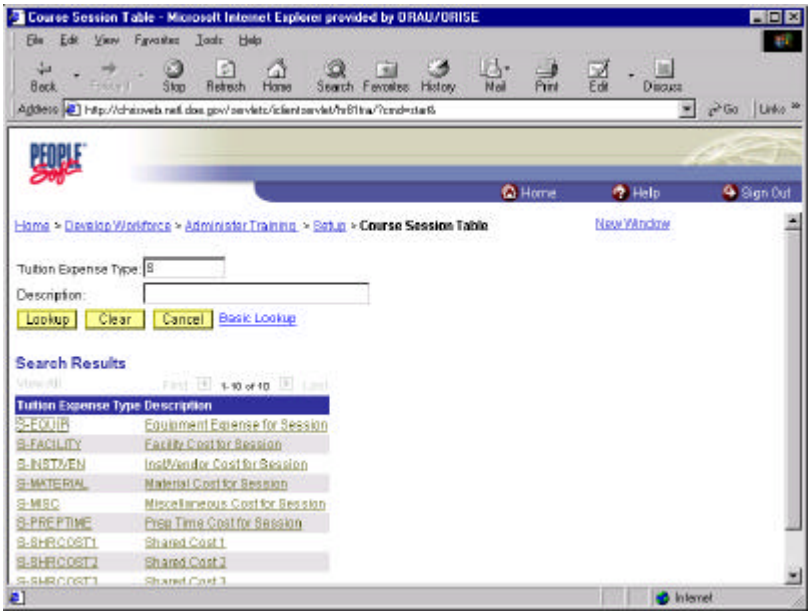
The "Expense" screen records expenses to the course session. This is an excellent way to track course session codes incurred regardless of the method of course session procurement and payment.

38. Click on the "Expense" tab.



The "Expense" screen is displayed.

39. Enter "S" in the "Expense" field and click on the magnifying glass to bring up only session expense types.



A list of session expense categories is displayed.

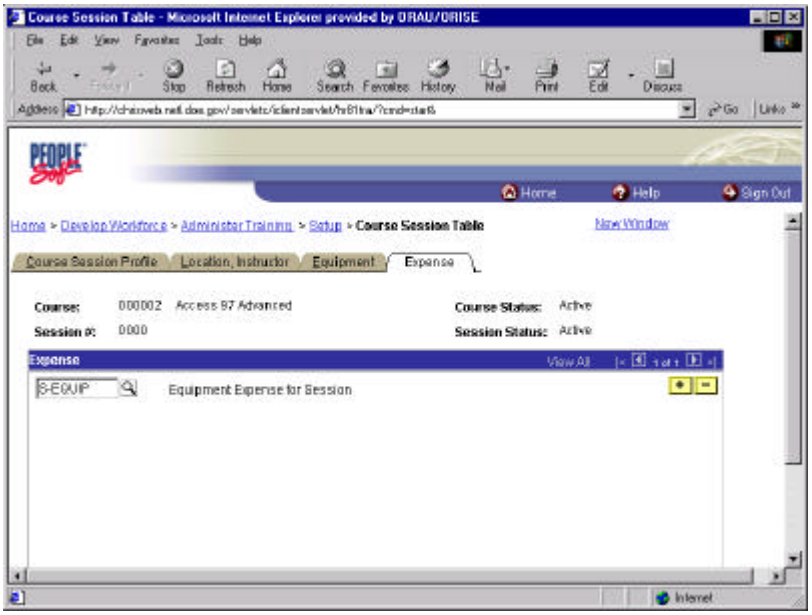
Note: If you have pulled up the entire expense list, the course session expense categories begin with an "S." Only expense categories displayed with an "S" should be chosen from this list. "I" denotes individual expenses used in "Student Training" and should NOT be associated with a course session.

Expense Categories

BUSINESS RULE

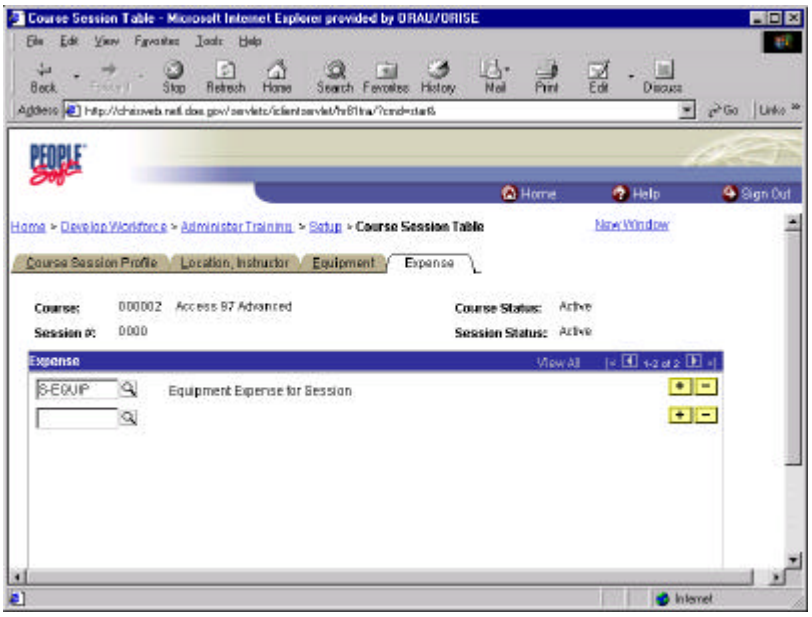
The expense categories capture all course session costs and should be completed for each category as necessary. These expense categories are reportable items for training costs. They give further explanation for the organizational costs associated with a course session.

40. Select the appropriate expense category.



The expense category and description are displayed.

Note: CHRIS allows users to insert rows in case there are multiple expenses to add. Click on the [+]. A row will be added below where the cursor was positioned.



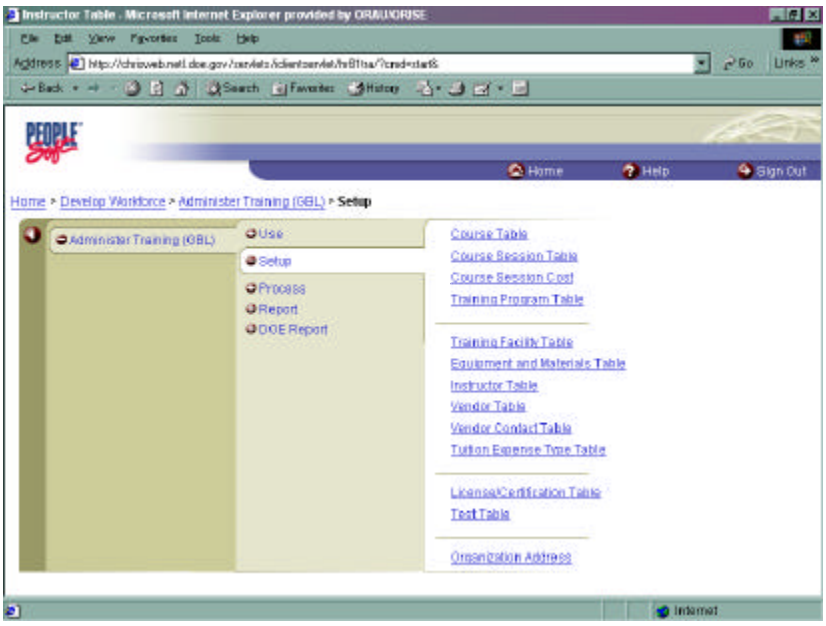
Repeat steps 39-40 to enter additional expense categories.

41. Click on "Save."

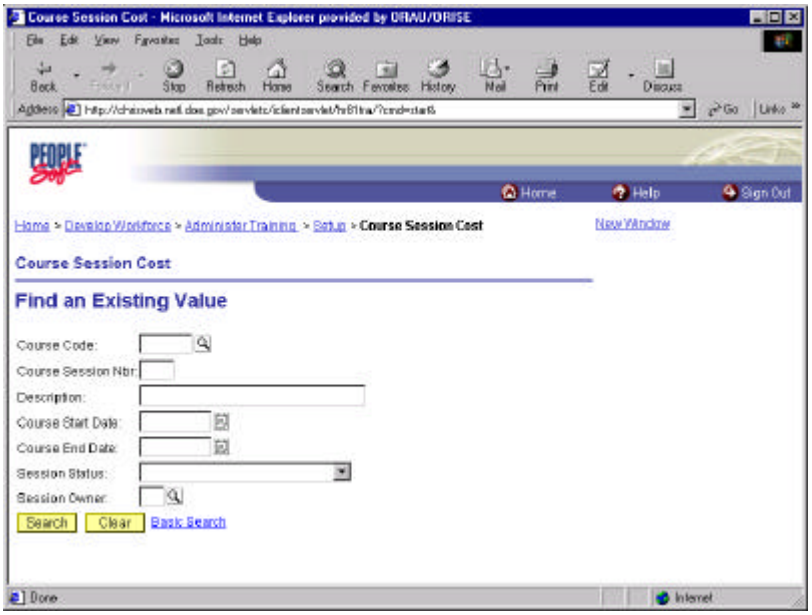
Entering Course Session Expense

1. At the "Home" screen, click on "Develop Workforce."
2. Click on "Administer Training (GBL)."
3. Click on "Setup."

4. Click on "Course Session Cost."



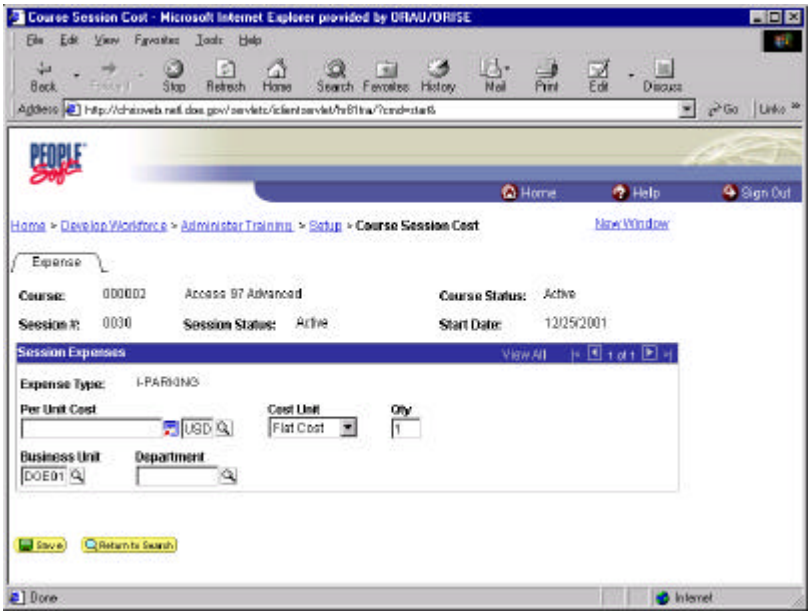
The "Course Session Cost" screen is displayed.



4. Enter the course code in the "Course Code" field or click on the magnifying glass to display a list of courses.

Note: If you just added a "Course Session," the system will take you directly to the "Session Expense" screen. Go to Step 6.

5. Enter the session number in the "Course Session Nbr." field and click the "Search" button.



The "Course Session Cost" screen is displayed.

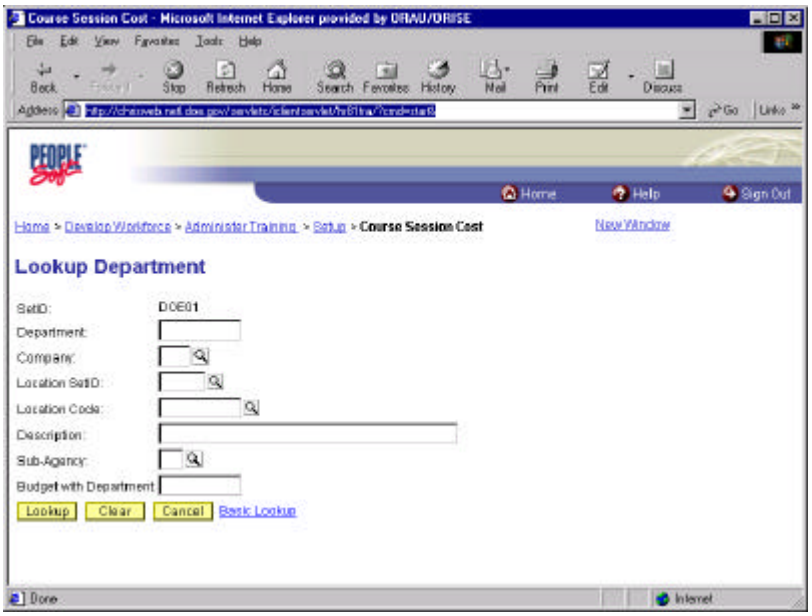
6. Enter the cost for each expense type (i.e., facility, tuition, etc.) in the "Per Unit Cost" field.

7. Tab to the "Cost Unit" field. The field defaults to "Flat Cost" but can be changed if necessary. Click on the down arrow and select the desired unit.

8. Click on the "Qty" and change as necessary.

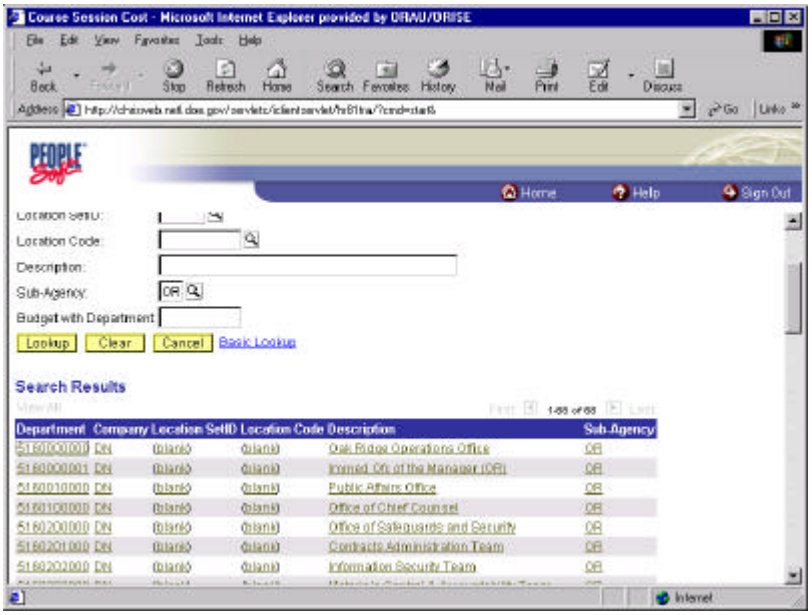
9. Click in the "Department" field and enter your charge to "Department" or click on the magnifying glass.

Note: The "Business Unit" is defaulted to "DOE01" and cannot be changed.



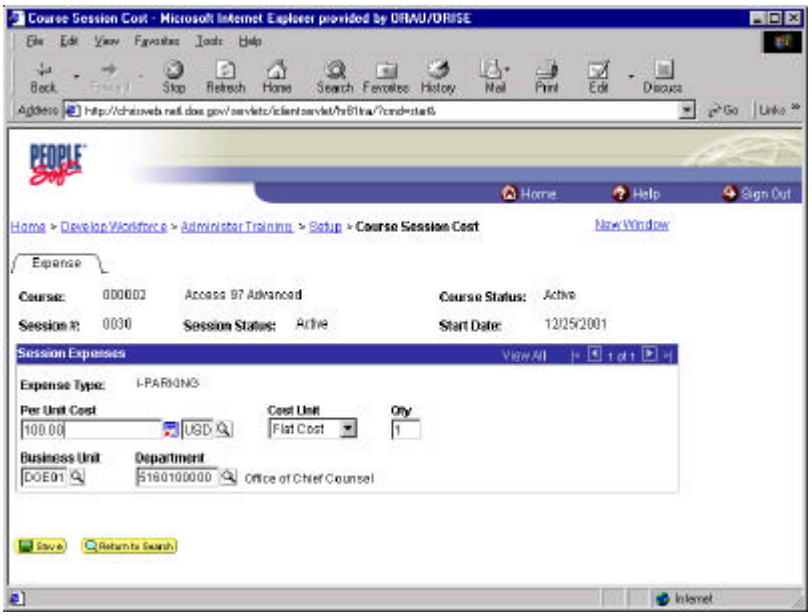
The "Lookup Department" screen is displayed.

10. Enter your Sub-agency (i.e. AL, CH, EM, etc.) in the "Sub-Agency" field and click the "Lookup" button.



The offices associated with the sub-agency are displayed

11. Select the appropriate office. The code is placed in the "Department" field. Repeat steps 9, 10, and 11 for each "Expense Type."



The "Department" code is displayed. This is the "bill to" department for the expense.

The "Per Unit Cost" and "Department" must be entered for each "Expense Type." The "Cost Unit" defaults to "Flat Cost" but can be changed if necessary.

12. Click on "Save."

Best Practice: Charge Codes

As with other codes, keep a list handy of the charge to "Department" codes you frequently use.